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ABSTRACT

The past decade has seen an increasing number of libraries move to convert their periodical holdings to microform. The very practical problem arises of how to determine which part of the collection should be converted and in what priority. A simple, yet effective, tool for use in non-research oriented colleges and universities is described. (Author)

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CONVERSION OF PERIODICAL HOLDINGS TO MICROFORM:

A RATING FORM

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ABSTRACT

The past decade has seen an increasing number of libraries move to convert their periodical holdings to microform. The very practical problem arises of how to determine which part of the collection should be converted and in what priority. A simple, yet effective, tool for use in non-research orientated colleges and universities is described.

The number of libraries utilizing microforms as a means of preserving their periodical collections has increased over the past decade. The rationale for the transformation from paper to microform as a storage medium are many and will not be recounted here. Let us suffice to say that once a library has decided to convert its holdings it is faced with the very practical problem of determining which titles should be converted first. The purpose of this paper is to describe how the problem was delt with by the University of Wisconsin - Stout.

A search of the literature did not reveal how other libraries approached this problem. Consequently we decided to develop a means of systematizing the process of evaluating our periodical collection for possible conversion to microform. We were looking for something that would be simple and yet would remove the decision making process from the "off the cuff" level. To this end we decided to develop a forced choice rating form similar to those commonly used in attitudinal surveys and preference testing.

Once we had determined the approach we would use in establishing a priority listing of titles, our next step was to identify the factors that would be considered in our evaluation. With this in mind, we attempted to identify the problems we were experiencing with our existing periodical collection. The outgrowth of this process was a list (example 1) of 8 factors, presented as positive statements, which we felt warranted conversion to microform. We do not consider this list to be definitive nor do we consider these factors to be static.

They were developed to fit our philosophy, needs and the state of microfilm technology at a given time. At another time or place other factors should no doubt be considered.

Once we had identified the factors that would be evaluated, our next step was to arbitrarily establish a rating scale of 0-8 for each factor. In this scale, if a factor was given a 0 it was considered to be false, if given an 8 rating it was considered to be true. Each factor would receive a rating of anywhere from 0 to 8. The higher the number of evaluation points the higher the holdings would be on the priority scale. In an effort to standardize our ratings we refined the scale for each factor. In the case of factor number 1, a percentage of the number of missing issues was equated with a number on the rating scale. The same approach was used for factor number 2 relating to number of mutilated issues. In the case of periodical usage, factor number 3, we equated each number on the rating scale with a range of numbers relating to the number of times a title was checked out. This approach was also used for factor number 7 where a range of page numbers were equated with the numbers on the rating scale. A similar approach was used for factor number 8 where a number on the rating scale was equated with the number of sources the title was indexed in. In the case of factor number 4, storage problems, a three point scale was used; 0 equaled no storage problem, 4 was equated with a magazine on a tabolid format and 8 was equated with a bulky item such as a newspaper. In the case of the paper quality, factor number 5, two points on the scale were used, 0 for paper in good condition and 8 for paper likely to or showing signs of deterioration.

The last factor, number 6, related to the type of writing and was the most difficult to judge. Three points on the scale were finally used as follows: 0 equaled popular, 4 equaled semi-popular, 8 equaled scholarly.

If, for some reason data was not available for a given rating factor, it was recorded a zero on the scale. This had the effect of providing high ratings for only those titles where adequate information was available for decision making.

With the scale developed and refined we then evaluated each title using the factors noted in example 1 and the guidelines noted above. The data for each title was placed on 3 x 5 cards (example 2) for ease of interfiling with our other records. As mentioned earlier the higher the evaluation score the higher the priority assigned to the title. The completed cards were arranged in order, highest to lowest, and the monies spent accordingly.

CONCLUSIONS

After using the scale for some time it became evident that the entire holdings of a particular title should not be evaluated on a single form. By breaking down holdings into 10 year time segments we found that the rating for each segment could vary considerably. Using this approach we found that we were better able to make a decision regarding holdings that could be converted, held in the paper form or discarded.

The use of the refined scale also removed much of the burden for gathering data from the shoulders of the Serials Librarian.

Most of the data can be gathered and tabulated by students leaving the final decision up to the professional librarian.

This scale, or a version of it, has been used at the University of Wisconsin - Stout for several years. It has proved an effective tool in our efforts to spend money more efficiently and wisely.

EXAMPLE 1

MICROFORM EVALUATION FACTORS

1. There are a considerable number of missing issues in each publishers volume.
2. There are a considerable number of worn or mutilated issues in each publishers volume.
3. The title is heavily used.
4. The format presents storage problems.
5. The paper is of poor quality.
6. Articles are popularly written and of current interest.
7. Articles are short.
8. The title is indexed.

EXAMPLE II

TITLE_____

_____

PERIOD EVALUATED_____

1._____ 5._____

2._____ 6._____

3._____ 7._____

4._____ 8._____

_____ TOTAL EVALUATION SCORE